# Exercise Guide for

# OM210

## Organizational Management for Agencies

**Disclaimer**:  The position action scenarios and exercises included in this course have been created solely for the purposes of training.

Table of Contents

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 3 of 51

| | Course Title: | Org Management for Agencies |
| --- | --- | --- |
| | Functional Area: | Human Resources |
| | Sub Area: | Organizational Management |

beacon
North Carolina
Office of the State Controller
INTEGRITY CONSISTENCY

# 2:1 – Exercise:  Log on SAP

## Scenario

You need to log on the SAP training client so that you can complete course exercises.

## Instructions

Use the steps and data presented below to log on SAP in the classroom.
1. Access the SAP portal web page.
   https://trg-mybeacon.its.state.nc.us
2. Enter the User ID and password that is assigned to your classroom PC.
3. Click on the Log on button.
4. Click **Yes** to confirm the security message displayed.
5. Click the SAP GUI tab.
6. Click the training client specified by your instructor.
7. Stop when you reach the SAP Easy Access screen.

| | *Course Title:* | *Org Management for Agencies* |
| | *Functional Area:* | *Human Resources* |
| | *Sub Area:* | *Organizational Management* |

INTEGRITY
**beACON**
CONSISTENCY North Carolina
Office of the State Controller

## 2:3 - Exercise:  Create a New Full-time Banded Position

ZOMA069

### Scenario

The Western office of the History Department of Cultural Resources has requested more building and environmental technicians. The new position will be:

- Available the first day of the next calendar quarter.
- Permanent, full-time position working forty hours per week.
- Subject to FLSA overtime.

### Instructions

Use the steps and data presented below to create the full-time graded position. Also, if required, refer to the OM Field glossary for the complete definitions of the data fields that are on the Create New Position action screens.

**NOTE**:  Use the Tab key rather than the Enter key to move through the fields on this screen.

1. Enter transaction code **ZOMA069,** for Position Actions, in the **Command** field and then click 🗹 (Enter) to display the initial screen for the transaction.
2. Type or select **100**, for Create New Position, in the **Action** field.
3. Click 🗹 (Enter) to continue. The screen is refreshed to display additional fields.
4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format.  For this exercise, the position is effective on the first day of the next calendar quarter.

   Observe that 12/31/9999 is the default in the Valid to field.
5. Click 🗋 (Create).  The Create New Position – CREATE screen displays with the General tab active.
6. Complete the following fields on the General tab:

| Field | Value |
|---|---|
| **Position** | |
| Position abbr. | **8800XXXX0001** (Use agency required naming convention.) |
| Position Name | **Building & Environmental Technician_XX**, where XX is your initials.  (You will only use the initials in the training class, not at your workplace.) |

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 5 of 51

7. Accept the default selection of the Open radio button to indicate that the position is not filled by an employee.

8. Complete the following fields on the General tab:

| Field | Value |
|---|---|
| **Position (continued)** | |
| Company Code | **NC01**<br>(**Note**: The State of North Carolina will use two company codes: NC01 and NC02. All agencies, except Transportation and Employment Security Commission, use NC01.) |
| Personnel area | **4601** for Cultural Resources |
| Business Area | **4600** for Cultural Resources |
| Pers. Subarea | **NC01** for 7 day Interface |
| Employee Group | **SPA Employees** |
| EE subgroup | **B1**, for Full-time, Subject to FLSA overtime, permanent |
| Hours per week | **40** |
| County Code | **011** for Buncombe |
| Position Types | **None** |
| **Position Relationships** | |
| Org Unit | **20010236** for CR CDS A&H HIS RES Western Office |
| Job | **30005055** for Bldg & Env A |
| Reports To | **60083644** for Archives & History Regional Supervisor |
| SOC Code | **372010** |

9. Click  (Enter) to validate your data entries and to populate the Pay Grade tab.

10. Click  (Save) to save the information entered on the General tab. The system displays the message, "Position ######## was successfully created" where ######## is the 8-digit position number that was assigned by SAP.

   **NOTE**:  SAP will hold the position number in the Planned status until the workflow has gone through the entire approval process.  Once the workflow is approved, all of the data for the position will be moved into the Active status. If the workflow is rejected or cancelled, the data will be moved into the Rejected status on the position. Once a position number has been assigned, BEST Shared Services can also view this position in SAP.

   **IMPORTANT**:  Write the position number that was generated by SAP for your position here: _____.

   **NOTE**: We recommend, as a best practice, that you record the position number generated by SAP on an appropriate business document for future inquiry in SAP.

**Last changed on:** V6_122308
**File Name: OM210**
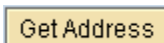**Last changed by:** snr
Page 6 of 51

11. Click the **Address** tab to continue. The screen refreshes and displays the data fields for address information. A position can have one or more of these three address records (subtypes): courier, main, and mailing.

12. Select **Courier** in the **Subtype** field.

13. Complete the following fields on the Address tab using title case for the data entry convention:

| Field | Value |
|---|---|
| House no/street | CS# 17-27-03 |
| PCode/City | 27704 Durham |
| Country | USA (may default) |
| Region (State) | NC (may default) |
| Telephone number | 919-555-1212 |
| Fax number | 919-555-1313 |

14. Click ☑ (Enter) to validate your data entries.

   **NOTE: Do Not Save** between address types. This will lock the record and will require exiting the record and coming back into the record in Change (Edit) mode.

15. Select **Mailing Address** in the **Subtype** field.

16. Click ⬚ Get Address to clear the previously displayed address.

17. Complete the following fields on the **Address** tab using title case letters for the data entry convention:

| Field | Value |
|---|---|
| House no/street | PO Box 2600 |
| PCode/City | 27704 Durham |
| Country | USA (may default) |
| Region (State) | NC (may default) |
| Telephone number | 919-555-1212 |
| Fax number | 919-555-1313 |

18. Click ☑ (Enter) to validate your address data entry, but do not click Save.

19. Select **Main Address** in the **Subtype** field.

20. Click ⬚ Get Address to clear the previously displayed address.

21. Complete the following fields on the Address tab using title case letters for the data entry convention:

| Field | Value |
|---|---|
| House no/street | 2612 N Duke St |

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 7 of 51

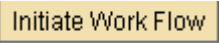| Field | Value |
|---|---|
| PCode/City | 27704 Durham |
| Country | USA (may default) |
| Region (State) | NC (may default) |
| Telephone number | 919-555-1212 |
| Fax number | 919-555-1313 |

22. Click ✅ (Enter) to validate your data entries.

23. Click 💾 (Save) to save the main address information entered on the Address tab. The system displays the message, "Position ######## Address data successfully created," where ######## is the 8-digit position number that was assigned by SAP.

24. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules. A position can have one or more of these three fields.

| Field | Value |
|---|---|
| **Holiday Payout Period** | |
| Comp Aging Limit | 365 Days |
| **Night Shift Premium** | |
| Night Shift Prem Rate | 10% |
| **Holiday Premium Rate** | |
| Holiday Premium Rate | 50% |

25. Click ✅ (Enter) to validate your data entries.

26. Click 💾 (Save) to save the data entered on the Time tab. The system displays the message, "Position ######## Time Data Successfully Created."

27. Observe that you do not enter information on the **Cost** tab. The workflow process will include the Funds Approver, who will enter the budget information on this cost tab.

The Services for Object list icon 📝 is located at the upper left-hand corner of your screen. It is used to add notes to notify the Office of State Personnel (OSP) of your action. It may also be used to attach a file or a web link (URL) to the record. You may also attach a private note as a reminder to yourself the purpose for creating the action, to document resource data used in the information gathering process for the action or for numerous other reasons you may choose to document. Only the initiator can see private note. If you click the left side of the document, a menu tool bar is displayed. If you click the right side of the icon, only a drop-down list is displayed.

28. Click the right side of the Services for Object list icon 📝 to display the drop-down list and add a note to notify the Office of State Personnel (OSP) of your action.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 8 of 51

29. Click **Create > Create Note** from the drop-down list. A dialog box is displayed.

30. You will be attaching notes to send to OSP regarding the request of the new position. Add a title and some notes to the dialog box to justify the position.

31. You also have the option of attaching documents. Select **Create > Create attachment** from the drop-down list or select the right side of the icon to display the toolbar.

32. Depending on where you clicked, an import file dialog box is displayed. Select any document in the list you wish to attach and click **Open**.

33. To view the note you just created, click on the Services for Object tool icon 📝. The Services for Object tool bar is displayed.

34. Click on the Attachment list icon 📎 to view a list of Notes or Attachments that have been saved to your request.

35. Click the green check mark to add your comments to the Position Request.

36. Click 💾 (Save) to save the note you just added for OSP.

37. Click [ Initiate Work Flow ] to initiate the workflow process. The system displays the message, "Workflow submitted for position: ######## PCR ID: ##########." The system also refreshes the Create New Position screen in display only mode.

    **Notes**:

    ▪ Once you have initiated workflow, no additional changes may be made to the position until the entire workflow approval process has been completed in either the approved or rejected status.

    ▪ If you do not initiate Workflow after you have saved the position record, you may access the Create New Position action using the Change 🖊 mode. You must enter both the original validity dates and the system assigned position number.

38. **IMPORTANT**: Write the PCR ID number that was generated by SAP for your work flow item here: _____.

## Instructions Part II – Process PCR as Funding Approver

The Agency Salary Control Officer (Agency Position Funding Approver) approves the position action after entering the cost distribution and position salary or they can reject the action.

1. Open a new SAP session and log using the **Funding Approver** ID and password.

2. From the Easy Access screen, click SAP Business Workplace 📦.

3. Click the node beside Inbox ▷ 📦 Inbox to expand it.

4. Double click on Workflow to display the workflows to be approved.

5. Select the PCR you want to review.

6. Double click to open.

7. Click each Tab (General, Address, and Time) to review for accuracy.

8. Click the Cost tab.
9. Click the Create/Update button and enter the information from the table below.

| Field | Value |
|---|---|
| **CoAr** | NC01 |
| **Cost ctr** | 4612900000 |
| **Order** | 100000006265 |
| **Fund** | 461290001 |
| **Percentage** | 100 |
| **Budget Amt** | $20,115  (Have to click Check Entry) |

10. Click Save and hit the green back arrow.

11. Click the Complete Work Item button.

12. Click the Approve Change option on the Decision on Workflow screen.

13. Log out as the Funding Approver.

**NOTE:** If needed, the OSBM Position Funding HR approves or rejects the position action.  (This is necessary for all new positions and reestablished positions.)

**NOTE:** If needed the OSP Position Approver will approve or reject the position action.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 10 of 51

**Instructions Part III – Process Approved PCR as Agency Position Approver**

Once approved the Agency Position Approver approves or rejects the position action.

1. Log on SAP using the **Agency Approver** user ID and password.

2. From the Easy Access screen, click SAP Business Workplace.

3. Click the node beside Inbox ▷ 📬 Inbox to expand it.

4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.

5. Select the PCR you want to review.

6. In the bottom section of the screen scroll down and click the link for the OM PCRxxxxxxxxxxxx (PCR number) that you want to review. The PCR Position Action Request screen is displayed.

7. Click Services for Object to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.

8. Select Attachment List. The Service: Attachment list pop-up is displayed.

9. Highlight the line item for the note, and select Display. The Display note pop-up displays with the note title and note information.

10. Click ❌ to close the Display note pop-up.

11. Click ❌ to close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

12. Click the back button to return to the Workflow screen.

13. With the applicable PCR still highlighted, click Execute (or double click the PCR line item).

14. Click Approve Change. Observe that you can also cancel the PCR and keep it in your files, or reject it and send it back to the Initiator.

15. Click the back button to return to the Easy Access menu.

16. Enter PO13 in the Command field and click Enter.

17. Click the Active tab. Note that no data exists. The position is not active until BEST processes the final step.

18. Click the X in upper right to log off as the Approver.  Click Yes at the Log off popup.

19. Click 🏠 (Exit) to return to the SAP Easy Access screen.

20. On the portal screen, click Log Off link.

21. Click Yes when prompted if you are sure. The Welcome log on screen is displayed.

**Instructions Part IV – Instructor Demonstration: BEST Shared Services Approval**

Upon final approval notified by Workflow the BEST Shared ServicesApprover converts the position action to active status in SAP.  SAPO will automatically send a record of the action to the Salary Control System for the necessary updates and reporting.

1. Log on SAP using the **BEST Shared Services Approver** user ID and password.

2. From the Easy Access screen, click SAP Business Workplace .

3. Click the node beside Inbox ▷ Inbox to expand it.

4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.

5. Select the PCR you want to review.

6. In the bottom section of the screen scroll down and click the link for the OM PCRxxxxxxxxxxxx (PCR number) that you want to review. The Create New Position – WORKFLOW WAITING FOR COMPLETION screen is displayed.

7. Click Services for Object  to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.

8. Select Attachment List. The Service: Attachment list pop-up is displayed.

9. Highlight the line item for the note, and select Display . The Display note pop-up displays with the note title and note information.

10. Click  to close the Display note pop-up.

11. Click  to close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.

12. Click the back button  to return to the Workflow screen.

13. With the applicable PCR still highlighted, click Execute  (or double click the PCR line item).

14. Click Approve Change line.  Observe that you can also cancel the PCR and keep it in your files, or reject it and send it back to the Initiator.

15. Click the back button  to return to the Easy Access menu.

16. Execute PO13 again. View the information on the Active tab. The position has moved from Planned to Active status.

17. Click  (Exit) to return to the SAP Easy Access screen.

18. On the portal screen, click Log Off link.

19. Click Yes when prompted if you are sure. The Welcome log on screen is displayed.

## Questions

Answer the following questions:

### Question 1

What is the effect if the wrong supervisor is selected in position relationships?

A

### Question 2

What does the personnel subarea field mean for Time Management?

A

This exercise is complete.

| | Course Title: | Org Management for Agencies |
| --- | --- | --- |
| | Functional Area: | Human Resources |
| | Sub Area: | Organizational Management |

beacon
North Carolina
Office of the State Controller
INTEGRITY CONSISTENCY

## 2:5 – Exercise:  Display a Position

ZOMA069

### Scenario

Sally, the personnel analyst for Cultural Resources just called you to verify that the Employee Group, SPA Employee, was entered for the Building & Environmental Technician position that you just created.  She was concerned that she inadvertently told you to use SPA Monthly.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1.  Enter transaction code **ZOMA069**, for Position Actions, in the **Command** field and then click  (Enter) to display the initial screen for the transaction.

2.  Type or select **100**, for Create New Position, in the **Action** field.

3.  Click  (Enter) to continue. The screen is refreshed and displays additional fields.

4.  Type or select the eight-digit position number generated by SAP for the Building & Environmental Technician position that you created in exercise 2.3.

| Field | Value |
| --- | --- |
| **Position number** | _____From 2:3 – Exercise |

5.  Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format that you entered in Exercise 2.3.  The default in the **Valid to** field is 12/31/9999.  It cannot be changed.

6.  Click  (Display).  The Create New Position – Display screen displays with the General tab active.

7.  Verify that the **Employee Group** field value is SPA Bi-weekly.

8.  Click the **Address** tab to verify the address information for each address subtype entered is correct.

9.  Click the Time tab to verify that the time management settings for the position have been correctly entered.

10. Click  (Exit) to return to the SAP Easy Access screen.

## Questions

Answer the following questions:

### Question 1

Why would Sally be concerned if the wrong Employee Group was selected?

A

--------------------------------------------------------------------

### Question 2

Was "SPA Bi-weekly" entered as the Employee Group for the position created in this exercise?  What does "SPA Bi-weekly" mean?

A.

--------------------------------------------------------------------

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 15 of 51

INTEGRITY
**beacon**
CONSISTENCY North Carolina
Office of the State Controller

## 2:6 – Exercise: Create a New Part-time Graded Position

ZOMA069

### Scenario

The Marketing Department of the Department of Agriculture has requested the Administrative Assistant I position be created. The personnel analyst has met with the department manager and has determined that the position:

- Will be available the first day of the next calendar quarter.
- Is a permanent, part-time position working 24 hours per week.
- Is subject to FLSA overtime.
- Is described by the graded job (class) Administrative Assistant I.
- Is not a key position and will not be required to work during adverse weather or conditions of a serious nature that prohibit some employees from reporting to work.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

**NOTE:** You will **NOT** initiate Workflow in this exercise at this time.

1. Enter transaction code **ZOMA069,** for Position Actions, in the **Command** field and then click 🅶 (Enter) to display the initial screen for the transaction.

2. Type or select **100**, for Create New Position, in the **Action** field.

3. Click 🅶 (Enter) to continue. The screen is refreshed and displays additional fields.

4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format. The position is effective on the first day of the next calendar quarter. The default in the **Valid to** field is 12/31/9999. It cannot be changed.

5. Click ▯ (Create). The Create New Position – CREATE screen displays with the General tab active.

6. Complete the following fields on the General tab:

| Field | Value |
|---|---|
| **Position** | |
| Position abbr. | **8800XXXX0002** (Use agency required naming convention.) |
| Position Name | **Administrative Assistant I** |

7. Accept the default selection for the **Open** radio button. This field indicates that the position is open and not held by an employee.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 16 of 51

8. Complete these remaining fields on the General tab:

| Field | Value |
|---|---|
| Company Code | **NC01** |
| Personnel area | **1001** for Agriculture Consumer Services |
| Business Area | **1000** for Agriculture and Consumer Services |
| Pers. Subarea | **7 day norm** |
| Employee Group | **SPA Employees** |
| EE subgroup | **Y1** for PT S-FLSAOT Perm |
| Hours per week | **24** |
| SOC Code | Will be grayed out and the value is inherited from the job (436010) |
| County Code | **Wake** |
| Position Types | **None** |
| **Position Relationships** | |
| Org Unit | **20001359** for the Marketing Department for the State Farmer's Market of the Department of Agriculture based in Raleigh (Agr Mkt Farmers Mkt & Mnt Fair Raleigh) |
| Job | **30000799** for Administrative Assistant I |
| Reports To | **60011611** for Assistant Director Agriculture Marketing Div |

9. Click ![Enter icon] (Enter) to validate your data entries and to populate the Pay Grade tab.

10. Click ![Save icon] (Save) to save the information entered on the General tab. The system displays the message, "Position ######## was successfully created" where ######## is the 8-digit position number that was assigned by SAP.

11. **IMPORTANT**: Write the position number that was generated by SAP for your position here: _____.

12. Click the **Address** tab to continue.

13. Select **Main Address** in the **Subtype** field.

14. Complete the following fields on the Address tab using title case letters for the data entry convention:

| Field | Value |
|---|---|
| House no/street | 1201 Agriculture St |
| PCode/City | 27603  Raleigh |
| Country | USA (may default) |
| Region  (State) | NC (may default) |
| Telephone number | 919-733-7125 |

| Field | Value |
|---|---|
| Fax number | 919-733-9932 |

15. Click ☑ (Enter) to validate your data entries.

16. Click 💾 (Save) to save the information entered on the Address tab.

17. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules. A position can have one or more of these three fields.

| Field | Value |
|---|---|
| **Overtime Compensation** | |
| Comp Aging Limit | 30 Days |
| **Holiday Payout Period** | |
| Comp Aging Limit | 365 Days |
| **Holiday Premium Rate** | |
| Holiday Premium Rate | 50% |

18. Click ☑ (Enter) to validate your data entries.

19. Click 💾 (Save) to save the information entered on the Time tab.

20. Click the Services for Object list icon 📝 at the upper left-hand corner of your screen to add notes to notify the Office of State Personnel (OSP) of your action.

21. Create a note to add a note documenting who the information gatherer was for this request.

22. Add a web link (URL) to the record as well.

23. Click the green check mark to add your comments and URL to the Position Request record.

24. Click 💾 (Save) to save the note you just created for OSP.

25. For this exercise, **do not** initiate workflow.

26. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 18 of 51

**Questions**

Answer the following question.

### Question 1

You discovered that you did not include a courier address. What are the steps you need to perform to add the address to the record?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 19 of 51

## 2:8 - Exercise:  Change a Position before Initiating Workflow

**ZOMA069**

### Scenario

Bob, the personnel analyst for the Department of Agriculture, has emailed you the courier address for the Administrative Assistant I position you created in Exercise 2.6.  He has also asked that you verify that the Org unit and Supervisor position numbers he provided to you earlier are correct.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

**To verify Org unit and position numbers, perform these actions**:

1. Click [icon] (Create New Session) button to open a second session of SAP.

2. Enter transaction code **PPOSE, for Organizational Staffing & Display,** in the

   **Command** field and then click [icon] (Enter) to display the initial screen for the transaction.

3. Search for the Org unit by using the Object ID by performing these actions:
   a) Expand the Org unit node.
   b) Click **Free Search**.
   c) Expand **Key fields**.
   d) In the Value selection column, select the **Object ID** checkbox.
   e) Type the Object ID for the Org unit in the Value field.  For this exercise type 20001359.
   f) Click the green check mark (Transfer hit list) to close the search window.
   g) Click **Yes** to confirm the system performance message.  The Org unit is displayed in the Selection area.  For this exercise the Org unit **Agr Mkt Farmers Mkt & Mnt Fair Raleigh** is displayed.
   h) Double-click on the Org unit to display its structure in the Overview section.
   i) Click on the [icon] One Level Up icon.  Note the Org unit to which the position reports.

4. Verify that the IDs for the Org Unit and Chief position listed in the following table are correct.

| Position Relationships | |
|---|---|
| Org Unit | **20001359** for the Marketing Department for the State Farmer's Market of the Department of Agriculture based in Raleigh (Agr Mkt Farmers Mkt & Mnt Fair Raleigh) |
| Reports to | **60011611** for Assistant Director Agriculture Marketing Div |

5. Click  (Back) to return to the SAP Easy Access screen of the current SAP session that you have open.

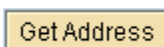6. Toggle back to the first SAP session that you opened.

**To change position information before you initiate workflow, perform these actions:**
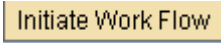
7. Enter transaction code **ZOMA069**, for Position Actions, in the **Command** field and then click  (Enter) to display the initial screen for the transaction.

8. Type or select **100**, for Create New Position, in the **Action** field.

9. Click  (Enter) to continue. The screen is refreshed and displays additional fields.

10. Type or select the eight-digit position number generated by SAP for the Administrative Assistant I position that you created in exercise 2.6.

| Field | Value |
|---|---|
| **Position number** | _____From Exercise 2.6 |

11. Type or select the effective start date of the position action that you performed in Exercise 2.6 which is the first day of the next calendar quarter. The default in the **Valid to** field is 12/31/9999.

12. Click  (Change). The Create New Position – Change screen displays with the General tab active.

13. Click the **Address** tab to continue.

14. Select **Courier** in the **Subtype** field.

15. Click  Get Address  to clear the previously displayed address.

16. Complete the following fields on the Address tab using all title case letters for the data entry convention:

| Field | Value |
|---|---|
| House no/street | CS# 17-27-03 |
| PCode/City | 27704 Durham |
| Country | USA (may default) |
| Region (State) | NC (may default) |
| Telephone number | 919-555-1212 |

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 21 of 51

| Field | Value |
|-------|-------|
| Fax number | 919-555-1313 |

17. Click ⊘ (Enter) to validate your data entries.

18. Review the Services for Object note you created in the previous exercise.

19. Click 💾 (Save) to save the data entered on the Address tab. The system displays the message, "Position ######## Address Data Successfully Modified".

20. Click [Initiate Work Flow] to initiate workflow. The system displays the message, "Workflow submitted for position: ######## PCR ID: ##########." The system also refreshes the Create New Position screen in display, read-only mode.

21. **IMPORTANT**: Write the PCR number that was generated by SAP for your workflow item here: _____.

22. Click 🏠 (Exit) to return to the SAP Easy Access screen.

## Question

Answer the following question.

### Question 1

When does the Change ( ✎ ) processing mode in the ZOMA069 transaction work for you?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 22 of 51

# 2:10 - Exercise:  Create a New Part-time Banded Position

**ZOMA069**

## Scenario

The Chief Deputy Attorney General of the Legal Services Branch of the Department of Justice has requested that a part-time Paralegal position be created.  The personnel analyst has met with the department manager and has determined that the position:

- Will be available the first day of the next calendar quarter.
- Belongs to the DOJ Legal Services Branch Org unit.
- Is described by the Paralegal job.
- The SOC code provided by the personnel analyst is 232011.
- Reports to the Chief Deputy Attorney General, position number 60010462.
- Is located at the main address of 301 N Wilmington, Raleigh, NC 27699.
- Can be reached through the MSC 4301 courier route or at 919-716-6865.
- Select the Pay Grade level field to reflect the banded progression level CB to CB.

## Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Access the **ZOMA069**, for Position Actions, transaction and create the part-time Paralegal position using the information provided in both the scenario and the data table.  You should initiate workflow once you have entered all of the data.

## Data Table

| Field | Value |
|---|---|
| **Position** | |
| Position abbr. | **8800XXXX0003** |
| Position Name | **Paralegal** |
| Company Code | **NC01** |
| Personnel area | **Justice** |
| Business Area | **Justice** |
| Pers. Subarea | **7 day Normal** |
| Employee Group | **SPA Employees** |
| EE subgroup | **Part time subject to FLSA, permanent** |
| Hours per week | **20** |
| SOC Code | Will be grayed out until you validate the job information |
| County Code | **Wake** |
| Position Types | **None** |

**NOTE:** Be aware that when you perform a matchcode search, sometimes the search view can change. To see the possible search view choices, click on 🔲 (Other search help) at the bottom of the search screen displayed. A pop-up box displays your search view choices. Click on the search you need. Your view will change to that search view.

2. You will need to search for the eight-digit ID code for Org Unit to which the position belongs and the ID code for Job that describes the position.

   a) Click in the Org Unit field and click the matchcode. Select the Abbreviation & Name tab.

   b) In the Name field, type ***Legal Services Branch***. (Don't forget the wildcards.)

   c) Click the green check mark (Enter) to search. DOJ Legal Services Branch is displayed in a pop-up box.

   d) Double click on the text to apply it to the Org Unit field.

   e) Repeat the steps for the Paralegal job.

3. Refer to the scenario for the data for the Reports To field.

4. Click 🟢 (Enter) to verify your information on the General tab.

5. You are prompted to complete the SOC field. Click on the matchcode and select the code displayed.

6. Click 🟢 (Enter) to verify your information.

7. Note that the Level field in the Pay Grade tab at the bottom of the screen is populated. Confirm that the levels are correct based on the information given in the scenario.

8. Save your request.

9. Enter a Holiday Premium Rate of **50%** on the Time tab.

10. Click Enter.

11. Save your request.

12. Add a Services for Object note for OSP.

13. Save your request.

   **IMPORTANT**: Write the position number that was generated by SAP for your position here: _____.

14. Initiate Workflow.

   **IMPORTANT**: Write the PCR number that was generated by SAP for your workflow item here: _____.

15. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

**NOTE**: For instructional purposes you are not going to enter any address information for the position.

## Questions

Answer the following questions.

### Question 1

What is the Personnel area field code value for Justice?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

### Question 2

What is the eight-digit ID code for the DOJ Legal Services Branch org unit to which the position belongs?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 25 of 51

## 3:2 - Exercise:  Display Position Infotypes (Single selection)

### RE_RHDESC10

### Scenario

Earlier today, you initiated the workflow for the Paralegal position that you created for the Department of Justice. You want to verify that the SOC code entered is correct. You can do this using the RE_RHDESC10, Display Infotypes, transaction to view the SOC code infotype screen.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system. Also, if required, refer to the Organizational Management Infotypes reference for the descriptions of all OM infotypes used by BEACON. This job aid is located on BEACON Help.

1. Add the Display Infotypes transaction to your favorites list on the SAP Easy Access screen.  The menu path for this transaction is *Human Resources > Organizational Management > Tools > Object > RE_RHDESC10 – Display Infotypes*.

2. Accept **01** for Current Plan as the default value in the **Plan Version** field.

3. Select **S** for Position in the **Object type** field.  (For this exercise, we want to display position infotypes, but you can also use this transaction to display other OM infotypes for jobs and Org units.)

4. Type or select the eight-digit position number that you created in 2:10 Exercise in the **Object ID** field.

5. Type or select **2**, for planned status in the **Object Status** field.

6. Type **9022**, for the SOC code in the **Infotype** field.

7. Click ![icon] (Execute).  In this exercise since you chose one infotype, 9022 for SOC code, the List Display SOC code screen is displayed.

8. Highlight the line with the record.

9. Select the infotype and click ![icon] (Choose) to display the infotype screen. You can view historical records and future effective dated records. For this exercise the Display SOC Code screen displays. This screen is the infotype record.

10. Click ![icon] to return to the previous screen.

11. Click ![icon] (Exit) twice to return to the SAP Easy Access screen.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 26 of 51

**Questions**

Answer the following question.

### Question 1

How did the SOC code field get populated on the Display SOC Code screen?

A

. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 27 of 51

## 3:4 - Exercise:  Display Position Infotypes (Multiple selections)

### RE_RHDESC10

### Scenario

Earlier today, you created these new positions:
- Building & Environmental Technician
- Administrative Assistant I
- Paralegal

Use the RE_RHDESC10, Display Infotypes, transaction to view the position relationships that are in planned status for all three positions you created.

### Instructions

Follow along with the Business Process Procedure (BPP) to complete the exercise scenario in the system. Also, if required, refer to the Organizational Management Infotypes reference for the descriptions of all OM infotypes used by BEACON.  This job aid is located in BEACON Help.

1. Access the RE_RHDESC10, Display Infotypes transaction.
2. Accept **01** for Current Plan as the default value in the **Plan Version** field.
3. Select **S** for Position in the **Object type** field.  (For this exercise, we want to display position infotypes, but you can also use this transaction to display other OM infotypes for jobs and Org units.)
4. Type or select the positions that you created earlier today in the **Object ID** field using the ⬜ (Multiple selection) button.  For this exercise, use the positions number that you created in 2:3, 2:6, and 2:10 Exercises.
5. Click the Copy button ⬜ to copy all the position numbers to the transaction.
   **NOTE**:  You will only see the first position number displayed, but the Multiple selection button will have a green marker indicating that additional numbers are included in the search.
6. Type or select **2**, for planned status in the **Object Status** field.
7. Select the **Relationships** infotype in the **Infotype** field by using your matchcode and selecting it from the menu.
   **NOTE:**  If you leave this field blank, you may have difficulty progressing through the remainder of the screens as intended in this exercise.
8. Click ⬜ (Execute) to display a list of the positions you entered in the Display Infotypes of an Object screen.
9. Click the ⬜ Display Object Infotypes button to display the List the Display Relationships screen.

10. Click on the gray selector button to the left of the relationship that you wish to view and then click ![Choose] (Choose) to display the infotype screen. For this exercise the Display Relationship screen displays. This screen is the infotype record.

11. Verify that the three relationships (position, job, org unit) you entered for the position in a previous exercise are correct by scrolling through the records using the Next Record and Previous Record icons ![icons] located at the left top of the screen.

12. Click ![icon] to return to the previous screen (List Display Relationships).

13. Click ![icon] again to return to the Display Infotypes of an Object screen to select a different position.

## Questions

Answer the following questions.

### Question 1

What are the relationships that exist in planned status for each position?

A

--------------------------------------------------------------

14. Repeat the steps above, but this time display all of the infotypes for your Paralegal position by using the Multiple Selection feature in the **Infotype** field. When the first infotype displays, use the back button to display the remaining infotypes.

These are the possible infotypes for a position.

| Infotype Name | Infotype Code | Infotype Name | Infotype Code |
|---|---|---|---|
| Object | 1000 | Night Shift Premium | 9007 |
| Relationships | 1001 | Evening Shift Premium | 9008 |
| (optional) Description | 1002 | Weekend Shift Premium | 9009 |
| Planned Compensation | 1005 | Holiday Premium Rate | 9010 |
| Vacancy | 1007 | On-call | 9011 |
| Acct. Assignment Features | 1008 | Callback | 9012 |
| Full Time Equivalent | 1011 | Charge Object Assignment | 9015 |
| Employee Group/Subgroup | 1013 | Extended duty | 9016 |
| Cost Distribution | 1018 | Display Budget | 9018 |
| Address: Main, Mailing, and Courier | 1028 | Reference Position Number | 9021 |
| OM Actions | 9000 | SOC Code | 9022 |
| Overtime Compensation | 9005 | Position Types | 9023 |
| Holiday Payout Period | 9006 | Vacancy posting data | 9025 |

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 29 of 51

**Hint**: Try entering these ranges and single values in the Multiple Selection for Infotype pop-up window:

- 1000 through 1018
- 1028
- 9000 through 9025

14. Click ⬛ (Exit) twice to return to the SAP Easy Access screen.

Answer the following question.

**Question 2**

How do you know if the position existed in the Legacy system? (**Hint:** Infotype 9021)

A

. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

This exercise is complete.

| | *Course Title:* | Org Management for Agencies |
| --- | --- | --- |
| | *Functional Area:* | Human Resources |
| | *Sub Area:* | Organizational Management |

INTEGRITY bEACON CONSISTENCY North Carolina
Office of the State Controller

# 4:2 – Exercise:  Reallocate a Position Up

**ZOMA069**

## Scenario

A decision has been made to reorganize the Historic Preservation area of Cultural Resources, specifically the Historic Preservation/Restoration Specialist I position, Org unit ID 20010227. The Historic Preservation/Restoration Specialist I (grade 68) is being reallocated up to Historic Preservation/Restoration Specialist II (grade 70) position.  Your agency's personnel analyst has asked you to perform the position action 103, Reallocate Position Up.

## Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click  (Enter) to display the initial screen for the transaction.

2. Type or select **103**, for Reallocate Position Up, in the **Action** field, and then click  (Enter). The screen is refreshed and displays additional fields.

3. Type or select the **position number** that is to be reallocated up in the **Position** field. See class data sheet for the position assigned to your student number.

4. Type or select the effective start date for the reallocation in the **Valid from** field in the mm/dd/yyyy format.  For this exercise, type the first day on the next calendar quarter.

5. Accept the default value of 12/31/9999 for the **Valid to** field.

6. Click  (Create).  The Reallocate Position Up – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

7. Complete the following fields in the New Values column on the General tab:

| General Tab | |
| --- | --- |
| **Position Relationships** | |
| Job | **Historic Preservation/Restoration SPE II**<br>**Hint:** (search for the job number using the matchcode) |
| Reports To | **Archaeology & Historic Preservation Adm** (same Org Unit) |
| **Employee Group/Subgroup** | |
| Employee Group | **SPA Employee** |
| EE subgroup | **Full time subject to FLSA overtime, permanent** |

8. Click ✅ (Enter) to validate your data entries and to populate the Pay Grade tab.

9. Save your request.

10. Add a Services for Object note for OSP.
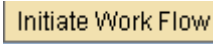
11. Click ✅ (Enter) to validate.

## Questions

Answer the following question.

### Question 1

Did the Employee Group and EE subgroup change? If so why?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

12. Save your request.

13. Click Initiate Work Flow to initiate workflow. The system displays the message, "Workflow submitted for position: ######## PCR ID: **********," where ######## is the eight-digit position number and ********** is the SAP generated number for the position change request ID. The screen is refreshed to display in read-only view.

14. **IMPORTANT**: Write the PCR ID number that was generated by SAP for your work flow item here: _____.

15. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 32 of 51

# 4:3 - Exercise:  Reallocate a Position Down

**ZOMA069**

## Scenario

A decision has been made to reallocate down the temporary position Program Assistant IV to a temporary Processing Assistant II that belongs to the Grants and Communication region.Your agency's personnel analyst has asked you to perform the position action 104, Reallocate Position Down.
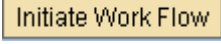
## Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Enter transaction code **ZOMA069**, Position Actions, in the command field and then click ✅ (Enter) to display the initial screen for the transaction.

2. Type or select **104**, for Reallocate Position Down, in the Action field, and then click ✅ (Enter). The screen is refreshed and displays additional fields.

3. Type or select the **position number** that is to be reallocated down in the **Position** field.  See class data sheet for the position assigned to your student number.

4. Type or select the effective start date for the reallocation in the **Valid from** field.  For this exercise type the first day on the next calendar quarter. Accept the default value of **12/31/9999** for the **Valid to** field.

5. Click 🗋 (Create).  The Reallocate Position Down – CREATE screen is refreshed and now displays the General tab and Pay Grade tab with a New Values column.

6. Complete the following fields on the General tab in the New Values column:

| Field | New Values |
|---|---|
| **Position Relationships Wildlife Fisheries** | |
| Job | **Processing Assistant II** |
| | **Hint:** matchcode search (Abbreviation and Name tab in the Name field) |
| Reports To | **Historic Preservation/Restoration Supervisor** |
| | **Hint:**  No change in "Reports To" |
| **Employee Group/Subgroup** | |
| Employee Group | **Supplemental Staff** |
| EE subgroup | **Temp FT S-FLSAOT** |

7. Click ✅ (Enter) to validate your data entries and to populate the Pay Grade tab.

8. Click ⊞ (Save) to save the information entered on the General tab. The system displays the message, "Re-Allocate Down for Position ######## Successfully Created" where ######## is the 8-digit position number that was assigned to your classroom user number.

9. Add a Services for Object note for OSP.

10. Click ✅ (Enter) to validate.

11. Save your request.

12. Click [ Initiate Work Flow ] to initiate workflow.  The system displays the message, "Workflow submitted for position: ######## PCR ID: **********," where ######## is the eight-digit position number and ********** is the SAP generated number for the position change request ID.   The screen is refreshed to display in read-only view.

13. **IMPORTANT**:  Write the PCR ID number that was generated by SAP for your work flow item here: _____.

## Questions

Answer the following questions.

### Question 1

Based on your State experience, what have been some of the business reasons that you have encountered that have caused a position to be reallocated down?

A
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

14. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

# 5:2 – Exercise:  Transfer a Position to another Agency

ZOMA069

## Scenario

Due to expansion, a full-time Processing Clerk V position at Juvenile Justice is being transferred the fifteenth of next month to Cultural Resources.  Your agency's personnel analyst has asked you to perform the position action 113, Position Transfer.

## Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Enter transaction code **ZOMA069**, Position Actions, in the **Command** field and then click (Enter) to display the initial screen for the transaction.

2. Type or select **113**, for Position Transfer, in the **Action** field, and then click (Enter). The screen is refreshed and displays additional fields.

3. Type or select the position number that is to be transferred in the **Position** field.  See class data sheet for the position assigned to your student number.

4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format. Accept the default value of **12/31/9999** for the **Valid to** field.

5. Click (Create).  The Position Transfer– CREATE screen refreshes with active fields displayed.

6. Complete the following fields in the New Values column:

| Field | New Values |
|---|---|
| Org Unit | **CR CDS A&H HIS RES HPO Restoration Brnch** (matchcode search) |
| Reports To | **60083643** |
| Personnel Area | **4601** |
| Personnel Subarea | **NC01** |
| EE Group | **A SPA Employees** |
| EE Subgroup | **FT S-FLSAOT Perm** |
| County | **Wake** |

7. Click (Enter) to validate your data entries.

8. Verify that the addresses are correct.

*Course Title:*    *Org Management for Agencies*
*Functional Area:*    *Human Resources*
*Sub Area:*    *Organizational Management*

9. To add an address, perform these actions:
   - Select the subtype. For this exercise, select **Main**.
   - Click the Get Address button.
   - Replace information in the appropriate fields.

| Field | Value |
|---|---|
| House no/street | **4617 MSC** |
| PCode/City | **27699 Raleigh** |
| Country | **US** (may default) |
| Region  (State) | **NC** (may default) |
| Telephone number | **919-807-6582** |

10. Click ✅ (Enter) to validate.

11. Click the **Time** tab to continue. The screen refreshes and displays the data fields required for time entry and payroll calculation rules.

12. Complete the following fields:

| Field | Value |
|---|---|
| **Holiday Payout Period** | |
| Comp Aging Limit | **365** Days |
| **Night Shift Premium** | |
| Night Shift Prem Rate | **10**% |
| **Holiday Premium Rate** | |
| Holiday Premium Rate | **50**% |

13. Click ✅ (Enter) to validate.

14. Click 💾 (Save) to save the information entered on the Time tab.

15. Add a Services for Object note for OSP.

16. Click ✅ (Enter) to validate.

17. Save your request.

18. Click ⬛Initiate Work Flow to initiate workflow.

19. **IMPORTANT**: Write the PCR ID number that was generated by SAP for your work flow item here: _____.

## Questions

Answer the following questions.

### Question 1

Assume the position transfer action has been approved and now the infotypes are in active status. What SAP transaction would you use to see the position in the organizational structure?

. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

20. Click  (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 37 of 51

## 5:4 - Exercise:  Change the Employee Group and Employee Subgroup Assigned to a Position

**ZOMA069**

### Scenario

Funding has been secured to change the part-time **Historic Preservation Reso RA SUPVR** position to full-time status. This event necessitates a change to the Employee Group and Employee Subgroup assigned to the position.  Your agency's personnel analyst has asked you to perform the position action 116, Position Employee Group/Subgroup change.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Enter transaction code **ZOMA069**, Position Actions, in the **Command** field and then click 🗸 (Enter) to display the initial screen for the transaction.
2. Type or select **116**, for Position Employee Group/Subgroup Change, in the **Action** field, and then click 🗸 (Enter).
3. Type or select the position number that is to be changed in the **Position** field.
4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format.  The position is effective on the first day of the next calendar quarter.
5. Accept the default value of **12/31/9999** for the **Valid to** field.
6. Click 🗋 (Create).  The Position Employee Group/Subgroup – CREATE screen is refreshed with active fields displayed.
7. Complete the following fields in the New Values column:

| Field | New Values |
|---|---|
| Weekly Work Hours | **40** |
| EE Group | **SPA Employees** |
| EE Subgroup | **FT S-FLSAOT Perm** |
| **Overtime Compensation** | |
| Comp Aging Limit | **30 Days** |
| **Holiday Payout Period** | |
| Comp Aging Limit | **365 Days** |
| **Night Shift Premium** | |
| Night Shift Prem Rate | **10%** |

| Holiday Premium Rate | |
|---|---|
| Holiday Premium Rate | **50%** |

8. Click ✅ (Enter) to validate your entry.

9. Click 💾 (Save) to save the information entered on the Time tab.

10. Add a Services for Object note for OSP.

11. Click Enter.

12. Initiate workflow.

13. **IMPORTANT**: Write the PCR ID number that was generated by SAP for your work flow item here: _____.

## Questions

Answer the following question.

### Question 1

Provide two examples of events that would cause the Employee Group/Employee Subgroup values to change?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

14. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 39 of 51

## 5:5 – Exercise:  Change the County Assignment for a Position

ZOMA069

### Scenario

Change the Wake County assignment to Durham County for a **Historic Preservation/Restoration Specialist II** in Cultural Resources org unit.  Your agency's personnel analyst has asked you to perform the position action 122, Position County Change.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Enter transaction code **ZOMA069**, Position Actions, in the **Command** field and then click  ✅  (Enter) to display the initial screen for the transaction.

2. Type or select **122**, for Position County Change, in the **Action** field, and then click  ✅  (Enter). The screen is refreshed and displays additional fields.

3. Type or select the position number that is to be transferred in the **Position** field.  See class data sheet for the position assigned to your student number.

4. Type or select the effective start date of the position action in the **Valid from** field in the mm/dd/yyyy format.  The position is effective on the first day of the next calendar quarter. Accept the default value of **12/31/9999** for the **Valid to** field.

5. Click  🗋  (Create).  The Position County Change– CREATE screen refreshes again with active fields displayed.

6. Complete the following field in the New Value column:

| Field | Value |
|---|---|
| **Position** | |
| County Code | **Durham** |

7. Add a Services for Object note for OSP.

8. Click  ✅  (Enter) to validate your entry.

9. Click  💾  (Save) to save the information you entered.

10. **IMPORTANT**:  Write the PCR ID number that was generated by SAP for your work flow item here: _____.

### Question

Answer the following question.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 40 of 51

| | Course Title: | Org Management for Agencies |
| | Functional Area: | Human Resources |
| | Sub Area: | Organizational Management |

North Carolina
Office of the State Controller

**Question 1**

List two reasons why it is important to enter the correct county code for the position.

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

11. Click  (Exit) to return to the SAP Easy Access screen.

This exercise is complete.

# 5:6 - Exercise:  Change the Title of a Position

PO13

### Scenario

A request has been made to change the working title for the **Office Assistant III** position. The working title is **Salary Administrator**. Your agency's personnel analyst has asked you to perform the Position Title Change.

### Instructions

Follow along with the Business Process Procedure (BPP) *Change Position Working Title IT 1000* and use the steps and data presented below to complete the exercise scenario in the system.

1. Type or select the position number that is to be changed in the **Position** field.  See class data sheet for the position assigned to your student number.

2. Click ⊘ (Enter) to display the position record.  For purposes of this exercise, the Office Assistant III is displayed.

3. Select **Object** infotype.

4. Click ☐ (Create).  The Create Object screen is displayed.  The system message indicates that this object already exists.

5. Complete the following fields:

| Field | New Value |
|---|---|
| **Position** | |
| Valid from | The first day of the next calendar quarter |
| Valid to | Accept the default value of 12/31/9999 |
| Object abbr. | **8800XXXX0005** |
| Object Name (Working Position Title) | **Salary Administrator_XX,** where XX is your initials. |

6. Click ⊘ (Enter) to validate your entries.

7. Add a Services for Object note for OSP.

8. Click 🖫  (Save) to save the information entered.

9. Click Yes on the delimit popup.

10. Click 🏠 (Exit) to return to the SAP Easy Access screen.

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 42 of 51

| | Course Title: | Org Management for Agencies |
| --- | --- | --- |
| | Functional Area: | Human Resources |
| | Sub Area: | Organizational Management |

INTEGRITY
bEACON
CONSISTENCY North Carolina
Office of the State Controller

## 6:2 - Exercise:  Display Status and Other Useful Information for a Position

**S_AHR_61016532**

### Scenario

You have performed several position actions today and the last item on your "to do" list is to search for information about the action performed on a position while you were on vacation.  You need to find out:
  ▪ Which position action was performed?
  ▪ When the action was performed?
  ▪ What PCR number was generated by SAP?
  ▪ What the status is of the workflow item?

You can use the S_AHR_61016532, Infotype Reporting transaction to capture this information.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. If it is not already in your Favorites, add the Infotype Reporting transaction to your favorites list on the SAP Easy Access screen and open it.  The menu path for this transaction is *Human Resources > Organizational Management > Info Systems > General > S_AHR_61016532 – Infotype Reporting*.

### Data Table

| Field | New Value |
| --- | --- |
| Plan version | **01** for Current Plan |
| Object type | **S** for Position |
| Object ID | Use the Position number from the data sheet for exercise 5.4 |
| Object Status | **2** for Planned |
| Reporting period | Select the **All** radio button |
| Infotype | **9000** for OM Actions |
| Display checkbox | Check **Infotype field selection.**  (This indicator allows you to select specific fields to be displayed on the report.) |

2. Click ⊕ (Execute) to continue. The Choose Infotype Fields (Screen 6000) is displayed with a list of all available fields selected.

3. Click 📝 (Deselect All) button to clear the default selections. This is an **IMPORTANT** step to narrow the contents of the report.  If you run the report for all fields, the system performance is greatly impacted.

4. Click the gray selector button to the left of the infotype fields that you want to display. For this exercise click these rows:

   - Type of Action (By selecting this indicator/field the position action number will display in the report.)

   - PCR ID (By selecting this indicator/field the PCR number that was generated when workflow was initiated for the position action will display in the report.)

   - Workflow status (By selecting this indicator/field the status of the workflow item will display in the report. The status are "N" for in process, "R" for rejected (back to initiator), and "C" for complete.

5. Click (Enter) to continue. The Infotype Reporting screen is displayed listing multiple records for the position. For this example, these four rows are displayed:

   - The first (top row) record is the "lead" record. This record tells you how many OM Actions have been performed on the position. For example, "With 1 OM Actions" means that 1 OM Action has occurred.

   - The second row provides the code for the action that was performed.

   - The third row provides the PCR number for the action.

   - The fourth row provides the Workflow Status.

## Questions

Answer the following questions.

### Question 1

What is the name of the position?
A

---

### Question 2

Which OM action has been performed?
A

---

### Question 3

What is the validity date for the OM action that was performed?
A

---

**Question 4**

What PCR number was generated by SAP?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

**Question 5**

What is the status is of the workflow item?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

You can also append this report to show the status of the selected infotypes.  For this exercise we chose to display only the OM Actions (IT 9000) infotype.  To display the infotype status on the report, perform the steps below.

6.  Click (Change Layout) button.  The Change layout pop-up window opens in front of the screen.

7.  If needed, click the **Sort Order** tab. You can also choose which columns to display or hide.

8.  Select or highlight **Status** in the Column Name table under Column Set.

9.  Click the (Add sort criterion) button.  This moves Status under the Column Name table under Sort criteria/Subtotals.

10.  Click (Transfer).  The Pop-up window closes and the Status column has been added to the Infotype Reporting screen.

Answer the following question.

**Question 6**

What does the infotype planned status tell you?
A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 45 of 51

**Bonus**

You can view the selected infotype by performing these actions:

11. Click ![i] (Object Description) to display the infotype screen.

12. Once the infotype record you want to view is selected, click Details icon to display the infotype screen. You can view historical records and future effective dated records) For this exercise the Details screen is displayed. This screen is the infotype record.

13. Close the Details screen.

14. Click ![icon] to return to the previous screen.

15. Click ![icon] (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 46 of 51

## 6:4 - Exercise: Display Job, Job Branch, and Job Family Infotypes

**RE_RHDESC10**

### Scenario

You want to view the jobs (classes) that are included in the Legal job branch which is part of the Administration and Management job family. You also need to verify the pay grade and midpoint for the Paralegal I position. Use the RE_RHDESC10, Display Infotypes transaction to inquire on these objects.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Access the RE_RHDESC10, Display Infotypes transaction. The Display Infotypes of an Objects screen is displayed.
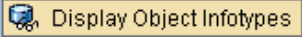
### Data Table

| Field | New Value |
| --- | --- |
| Plan version | **01** for Current Plan |
| Object type | **30** for Job Branch |
| Object ID | **80000008** |
| Object Status | **1** for Active |
| Data Status | **1** for All existing (Click the Data Status button that follows Object Status field to display Data Status field.) |
| Structure Parameters (Evaluation Path field) | **Z30_C** (to identify the search parameter requesting all the Job classes assigned to the Legal Job Branch) |

2. Click ☑ (Enter) to continue.

3. Click the 🕓 (Execute) button to display the list of records in the SAP database for the selected object.

### Question 1

What do the columns PV and OT show? How does this help you?

4. Click on the Paralegal I (30000744) job class to highlight the text.

**Last changed on:** V6_122308
**File Name: OM210**
**Last changed by:** snr
Page 47 of 51

5. Click [Display Object Infotypes] to display the Object.

6. Click the gray selector button to the left of the infotype record to select it.

7. Click 🗔 (Object Description) to display the Object infotypes available for the Paralegal I job class.

**Question 2**

Which infotypes have been created for the Paralegal I job?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

8. Click the gray selector button to the left of the Relationship infotype record to select it.

9. Once the infotype record you wish to view is selected, click the 🖼 (Overview) button to view the infotype screen. For this exercise the List Display Relationship screen displays.

10. Click the gray selector button to the left of the record you wish to view.

11. Click the Choose icon.

12. Click the 🗎 (Next record) button to scroll through each job record.

**Question 3**

What is the pay grade and salary range for the Paralegal I job?

A

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

13. To see a list of all jobs in the job branch, perform these actions:

- Click the 🔙 (Back) button to return to the previous screen which is the Display Object screen.
- Select the Relationship object.
- Click the 🖼 (Overview) button to view the List Display Relationships screen which lists the job family and all jobs associated with the Legal job branch.

14. Click the 🔙 (Back) button until you return to the Display Infotypes of an Object data entry screen.

15. Repeat the appropriate steps above and display the infotypes for the Paralegal job.
   **Hint**: You will need to change the Object type field to **C** for job and search for the object ID for the paralegal job. You will also need to delete the evaluation path code.

16. For further practice, view the job infotypes.

| Infotypes to be viewed |
| --- |
| Object |
| Relationships<br>  Job Family<br><br>  Job Branch |
| Description |
| Planned Compensation |

17. Click 🏠 (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.

| Course Title: | Org Management for Agencies |
| Functional Area: | Human Resources |
| Sub Area: | Organizational Management |

**beacon**
North Carolina
Office of the State Controller

## CR:1 - Course Review:  Create a Full-time Graded Position

**ZOMA069 and RE_RHDESC10**

### Instructions

Use the steps and data presented below to complete the exercise scenario in the system.

### Scenario

The Western office of the History Department of Cultural Resources (CR CDS A&H HIS RES WESTERN OFFICE) has requested more building and environmental technicians. The new position should be named Building & Environmental Technician.
- Will be available the first day of the next calendar quarter.
- Permanent, full-time position working forty hours per week.
- Subject to FLSA overtime.
- Is described by the job (class) of the same name.
- Reports to the Archives and History Regional Supervisor. (*Hint: Open new session. Use PPOSE to search for the Archives and History Regional Supervisor position in the Western office of the History Department of Cultural Resources.)*
- Is in the SPA Employees employee group.
- SOC code is 372010
- Is located in Buncombe County at 2612 N. Duke Street, Durham NC  27704.  The phone number is 919-555-1212.  The courier route is CS#17-27-03, Durham NC 27704.  Fax number is 919-555-1313.
- Is eligible for the 50% holiday premium.
- Is eligible for 10% night shift premium rate.
- Is designated a non key position.

### Instructions

Follow along with the Business Process Procedure (BPP) and use the steps and data presented below to complete the exercise scenario in the system.

1. Access the **ZOMA069**, for Position Actions, transaction and create the full-time Building & Environmental Technician position using the information provided in the scenario. Initiate workflow once you have entered all of the data.

    **Hint**: You may need to open a second session and use PPOSE to search for the organizational unit and reporting supervisor codes to enter on the General tab in your original session.

2. **IMPORTANT**:  Write the position number that was generated by SAP for you position here: _____.

3. **IMPORTANT**:  Write the PCR ID number that was generated by SAP for your work flow item here: _____.

## Question

Answer the following questions.

### Question 1

What infotypes were created in planned status for this position?

A

### Question 2

What transaction displays the infotypes created for this position?

A

### Question 3

To which organizational unit does the position belong?

A

### Question 4

What is the 8-digit code for the supervising position (the reports to relationship)?

A

### Question 5

To which Personnel subarea does the position belong?

A

18. Click  (Exit) twice to return to the SAP Easy Access screen.

This exercise is complete.